



MILWAUKEE COUNTY  
Behavioral  
Health  
Division



## BHD Crisis Plan

From the Home Screen, search for and select the client. With the client selected, enter BHD Crisis in the Search Forms box. Double-click to select the BHD Crisis Plan.

Name	Menu Path
BHD Crisis Plan	Avatar CWS / Treatment Planning

For a new client/plan, the form opens upon selecting the form (above).

Note- If the client has a previous Crisis Plan, a series of screens are presented that allow you to pull information forward from previous plans as needed. Follow the steps below to pull information forward from previous plans.

1. From the list of finalized plans, select Add.
2. Select Yes to pull forward info from previous plan.

Plan Date	Plan Type
11/21/2019	Active

Plan Date	Plan Type	Plan Name	Plan Status
11/21/2019	Active		Final

3. From the drop-down list, select the plan date that you want to pull information from.

4. Data entry date defaults to today, click OK.

5. Select Yes to default information from this plan.

The form opens data entry.

**Red**, required fields must be completed before the form can be finalized. Items in **black** are not mandatory to complete. **However, always check with your Supervisor for individual program requirements.**

1. **Data Entry Date:** **mandatory field**- the date you start data entry on the form. This will usually be 'Today's Date'. (TIP – cannot be changed once submitted).
2. **Plan Start Date:** **mandatory field**- the date the Crisis Plan actually starts.
3. **Plan End Date:** **mandatory field** - set for 6 months after the Plan Start Date.
4. **Plan Type:** **mandatory field**- select Active for the initial plan and any subsequent updates.
5. **Last Updated By:** this will be filled in electronically after you “submit” the plan, naming the last person who opened this plan.
6. **Last Updated:** the date that the last person listed, opened the form.
7. **Treatment Plan Status:** **mandatory field**- should be Draft while making edits. Electronic signatures cannot be obtained until the Status is listed as Final.

## Concerns:

1. Select each concern (problem) listed that should be included in the plan. Every concern you select will appear when the plan is launched. You must have at least one intervention for each concern included in the plan. (\*See below for additional information on this section).
2. Enter the client's current medications.

\* The 'Concerns' section is populated from the Avatar Problem List. Additional concerns/problems can be added using the forms/steps below.

1. Complete the Diagnosis Form and select **Yes**, to 'Add to Problem List' at the bottom of the form.
2. Complete the Problem List Form.
3. Add a new row to the grid in the Concerns section.

To add a new row to the grid, use the steps below:

1. Select **New Row**.
2. **Problem- mandatory field**- click in the Problem field and enter a problem/diagnosis. Click Enter.
3. In the Search Results box scroll down to find the appropriate problem. Click Select.
4. **Other**- if you can't find a specific type of problem, use *Specify Other* for the Problem in #2 and enter a description in the **Other** text box. Click Ok.
5. **Type**- select the type of problem, Primary or Secondary. This is not required, but is populated when completing the Diagnosis Form in Avatar.

6. **Date identified**- indicate the date the problem was identified, as needed.
7. **Date of Onset**- **mandatory field**- indicate when the problem started. If the onset date is unknown, use the episode admission date.
8. **Status**- **mandatory field**- select an appropriate value from the drop-down list and click Select. Usually this is set to Active. If you Resolve a problem, indicate the date in column 9.
9. **Date Resolved**- enter the date the problem is identified as resolved. (See #8 above)
10. **Action**- for all Active problems, enter 'Treating' in this field. For other problems not included in the plan, enter a reason why the problem is not included in the plan.
11. **Problem Information**- this is an embedded link to Medline Plus, a website for additional health information.

The screenshot shows a table with columns: Date Identified, Date of Onset, Time Of Onset, Status, Severity, Chronicity, Date Resolved, Action, Comment, System Notes, and Problem Information. The first four rows are highlighted in blue. Red circles with numbers 6 through 11 are placed over specific fields in the first row: 6 over Date Identified, 7 over Date of Onset, 8 over Status, 9 over Date Resolved, 10 over Action, and 11 over Problem Information. Below the table, there is a 'Status search results' dialog box. It has a table with 'Code' and 'Description' columns. The codes listed are A (Active), NTSTPVOID (Auto Delete From Treatment Plan), D (Discharged), I (Inactive), M (Monitoring), R (Resolved), U (Unresolved), and V (Void). The 'A' row is highlighted in green. At the bottom of the dialog box, there are 'Select' and 'Cancel' buttons. A red box highlights the 'Select' button, and a mouse cursor is pointing at it.

**Plan Participants**- use this section to select all members participating in the plan, including the client. Click New Row/Delete Row as needed to add or delete plan participants.

1. **Role**- **mandatory field**- the role of the participant (i.e. Case Manager).
  2. **Staff ID**- depending on which role you chose, this field will either be required, or not. If you chose a role that refers to a person who has access to Avatar, then this field will be **mandatory**. When you start entering a name, (press tab), the provider's name will appear for you to choose it. If you've chosen a role that does not have access to Avatar, then you cannot type in this field. \*(Ext) will jump to Participant name.
  3. **Participant Name**- will pre-populate if Staff ID was entered. If you were not able to choose a Staff ID, then you will need to enter the participant name in the text box.
  4. **Plan Author**- **mandatory field** - there can only be one Plan Author. This yes or no field answers the question, "Is the person in this role the Plan Author" (person completing the Crisis Plan)?
  5. **Notification**- **mandatory field** – This yes or no field answers the question, "Is the person in this role a team member with access to Avatar that will review the plan at the next review date"?
- Note**- See notification workflow at the end of this section.
6. **Signature**- all non-Avatar users will sign using the electronic signature pad. Members of the team will electronically approve, but only after the plan has been designated as final.
  7. **Declined to Sign**- only check this box on the consumers row and only if the consumer declined to sign.
  8. **Signed on Paper**- last resort option if signature pad is not working. If used, the signature/plan will need to be scanned into Avatar.

PLAN PARTICIPANTS

1

2

3

4

5

7

8

	Role	Staff ID	Participant Name	Plan Author	Notification	Signature	Declined to Sign	Signed on Paper
1	Psychologist (IN...	KUEHL,JUSTIN D (005104)	KUEHL,JUSTIN D	No (N)	Yes (Y)	Sign		

6

Highlight a row and click here to remove a plan participant.

Click the arrow to undock this section.

New Row

Delete Row

## Notification Workflow (5) above

Each plan participant marked **Yes** in the 'Notification' section will receive a message on the 'My To Do's' widget 30 days prior to the next review date. This is a reminder to the recipient that the plan needs to be reviewed and updated in the next month.

1. The reminder will appear on the To Do widget and indicate the date the Crisis Plan is due for review.
2. Clicking on the link in the Forms column will open the form; however, the form can only be reviewed as it is in Final status.
3. To review the To Do item, click the link in the Action column. A Review ToDo Item box opens for further actions (see step 4 for details).

My To Do's All (1) New (1) Sign (0)

Filter All

Client	Action	Form	Sent	From	Comments	Note-to-Self	View Detail
Linda M Town...	Review To Do Item	BHD Crisis Plan	11/21/2019	CSM PROGRA...	BHD Crisis Plan " Is Due For Review On 12/04/2019		

1 Click Icon for a Quick View of Details for the selected row.

4. A summary of the ToDo displays. To view a detailed report of the Crisis Plan, click View Detail.
5. To mark the item as reviewed and **delete** it from the 'My To Do's' widget, select the Reviewed box and click Submit. Use caution as this action permanently deletes the message.
6. If you'd like to **keep** the reminder on your 'My ToDo's' widget, click the red X to exit the form.

Chart Review To Do Item

Review To Do Item

Submit

6

Online Documentation

To Do Information

Date Sent : 11/21/2019  
Time Sent : 11:31 AM  
Sent By : CSM PROGRAMMING  
Option : BHD Crisis Plan

BHD Crisis Plan " Is Due For Review On 12/04/2019

4

5 Set To Do Item to Reviewed

Reviewed

View Detail

## Client Input

▼ CLIENT INPUT

Strengths

A

Barriers

B

Present Coping Skills

C

- A. **Strengths** can be identified as skills, characteristics, attributes, interests, cultural influences, experiences, activities, environmental factors, natural supports, previous successful strategies that lend to success in life and are valued by the consumer. Strengths can be self-identified or identified by others.
- B. **Barriers/Needs** may include the consumer's symptoms, behaviors, functional skill deficits, and resource needs that have a negative impact on a consumer achieving their life vision. What are a consumer's challenges/needs because of their mental health and/or drug use? They can be self-identified or identified by other team members.
- C. **Present Coping Skills** are the actions or reactions that a person may demonstrate or manifest when dealing with life stressors whether self-identified or identified by treatment team. (Examples of positive coping skills include physical exercise, taking a walk, taking a hot shower, calling the crisis line, meditating, calling a sponsor, etc.).

Work/School Activity Schedule

D

Previous Mental Health Services Provided

E

What are the concerns of the people providing support to the individual when in crisis?

F

- D. **Work/School Activity** would include the person's typical daily schedule, i.e. attends school daily, volunteers at St. Ben's, attends day program at Our Space, etc.
- E. **Previous Mental Health Services Provided** would include a list of any mental health services the individual has participated in that they are no longer involved with (would include previous case management services, psychiatry, therapy etc.).
- F. **What are the concerns of the people providing support to the individual when in crisis?** This would include input from other participants on the plan.

Add additional Client input comments as needed and click **Launch Plan**.

Comments

Add additional comments as needed.

Launch Plan

## Launch Plan

Use this section of the plan to address planned interventions for each Concern/Problem checked on page 1 as, Included in the plan.

1. Use the arrows to expand/collapse sections of the page for easier viewing.
2. Each concern checked (from plan page 1) as 'Included in the Plan' is listed. **Select the first concern** listed.
3. **Problem Code**- **mandatory field** - this pre-populates from plan page 1.
4. **Date of Onset**- **mandatory field** - this pre-populates from plan page 1.
5. **Concern**- **mandatory field** - this pre-populates from plan page 1, but can be revised. Consider editing this field to reflect language that is person-centered (i.e., George experiences both positive and negative symptoms of Schizophrenia including, ..... ) rather than simply defining a person by their diagnosis.
6. **Date Opened**- **mandatory field** – (Start Date) should correspond to the first time this specific concern is listed in the Crisis Plan.
7. **Other** – list other problem related information here.
8. **Status (Problem List)** - **mandatory field** - this pre-populates from page 1.
9. **Status** – **mandatory field** – Active or Resolved. The problem should be Active until it is completed and then select Resolved. Once the problem is Resolved, all related interventions should be removed.
10. **Add New Intervention** – with the Concern selected (highlighted) click *Add New Intervention*.

BHD Crisis Plan

Gender

grams

1

2

3

4

5

6

7

8

9

10

Problem Code

Adjustment disorder with disturbance of conduct

Date of Onset

11/01/2019

Concern

Adjustment disorder with disturbance of conduct

Date Opened

11/22/2019

Staff Assigning

CANNON,EMILY Z

Other

Status (Problem List)

Active

Status

Active

Add New Concerns

Add New Intervention

Delete Selected Item

## Interventions

1. **Intervention**- **mandatory field** – enter the intervention here.
2. **Date Opened** (Start Date)- **mandatory field** – this is the date the intervention started. It needs to match the 'start date' or 'updated date' of the plan.

3. **Status-** Active or Resolved- **mandatory field** – the status should be Active until the intervention is completed and then choose Resolved.
4. **Staff Assigning-** this pre-populates with the author's name.
5. **Responsible Party-** choose the appropriate option from the drop-down menu.

The screenshot shows a web application interface for a crisis plan. At the top, a tree view lists concerns: 'Mood disorder', 'Hallucinogen psychosis', and 'Hypertension, benign'. Below this is a form for adding a new intervention. The form includes a text field for the intervention name (callout 1), a date opened field (callout 2) set to 10/17/2018, a status dropdown menu (callout 3) set to 'Active', a staff assigning dropdown menu (callout 4) set to 'MORRIS,SUSAN', and a responsible party dropdown menu (callout 5) set to 'Clinical Coordinator'. Buttons for 'Add New Concerns', 'Add New Intervention', and 'Delete Selected Item' are at the top. At the bottom are 'Back to Plan Page' and 'Exit to Home View' buttons.

Each Concern listed in the plan will have a corresponding Intervention. Select the Concern and *click Add New Intervention*, and repeat the steps above for each Concern.

## Move Plan to Final

The plan can be saved as draft until it is complete and ready for finalization. Once the plan is completed, it can be moved to Final status. Select the *Back to Plan Page* button to save the plan as draft or move it to Final.

This screenshot is a closer view of the bottom of the intervention form. The 'Back to Plan Page' button is highlighted with a red rectangular box, and a mouse cursor is pointing at it. The 'Exit to Home View' button is also visible to its right.

To move the plan to final, from Plan Page I, select Final. Click Submit.

A 'tiff' image of the document is presented. Carefully review the document for errors and completeness.

1. Use the arrow keys to page forward through the document.
2. If you find an error or need to add something, click *Reject*. Move the document back to Draft status, make corrections, and resubmit.
3. Once satisfied with the document, click *Accept and Route/Notify* to route for Supervisor approval.
4. Enter your password. This is your electronic signature.

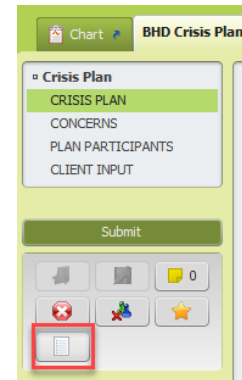
Depending on Program policy, search for and add Supervisor, Approver, or others to Notify. This includes any plan participant with Avatar access that needs to sign the plan. Click *Add* for each group. Verify that a check mark appears for each person that needs to approve or needs to be notified. Click *Submit*.

Approver	Final Approver	Notify	Title	Name
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Supervisor	Doctor Morris (011576)
<input checked="" type="checkbox"/>		<input type="checkbox"/>	Staff	WALTER M DRYMALSKI (...)
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Staff	MICHELE T LECLOUX (00...

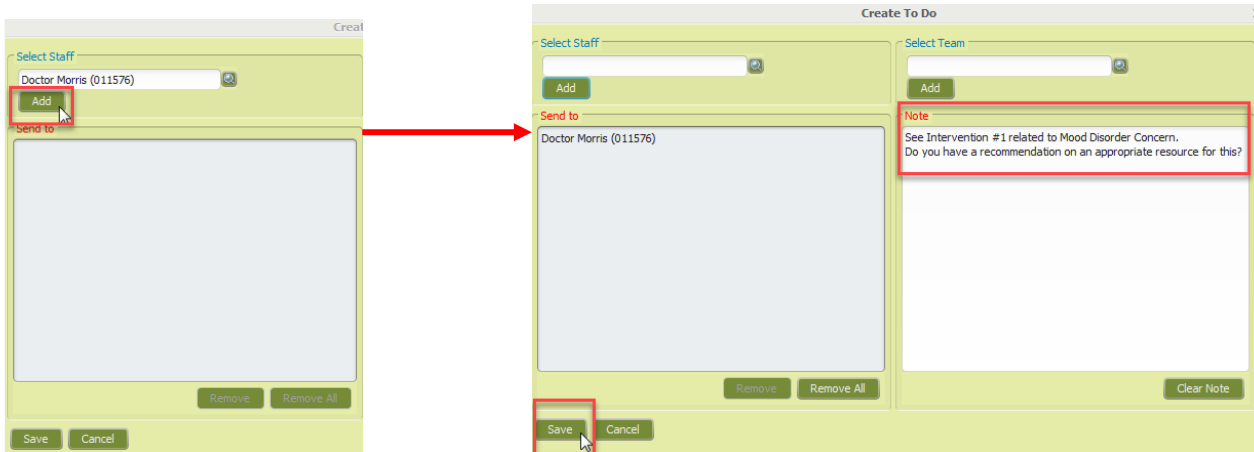
## Create a To Do Message to send to a Colleague

While not required, this functionality allows the user to send a message to a colleague prior to submitting a final Crisis Plan. Whether you require more information about client concerns or have a question about an intervention, the tool allows you to communicate with another within the context of the plan itself.

Click the icon below the red X to open a new 'Create To Do' message.

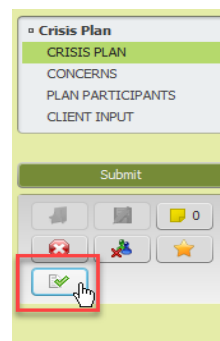


Select a user to send the message to and click **Add**. Enter the note and click **Save**.



The icon is now checked indicating the note has been sent.

Submit the form as needed.



The staff member you sent the message to receives a 'To Do' item with the comments.

Client	Action	Form	Sent	Comments	Note-to-Self
Tom Petty	Approve Document	Individual Progress	10/16/2018	Review Docu...	
John Lennon	Approve Document	Individual Progress	10/16/2018	Review Docu...	
Kitty Cat	Review To Do Item	Individual Progress	10/16/2018	Review Draft ...	
John Lennon	Review To Do Item	BHD Crisis Plan	10/18/2018	See Intervent...	See Intervention #1 related to Mood Disorder Concern. Do you have a recommendation on an appropriate resource for this?